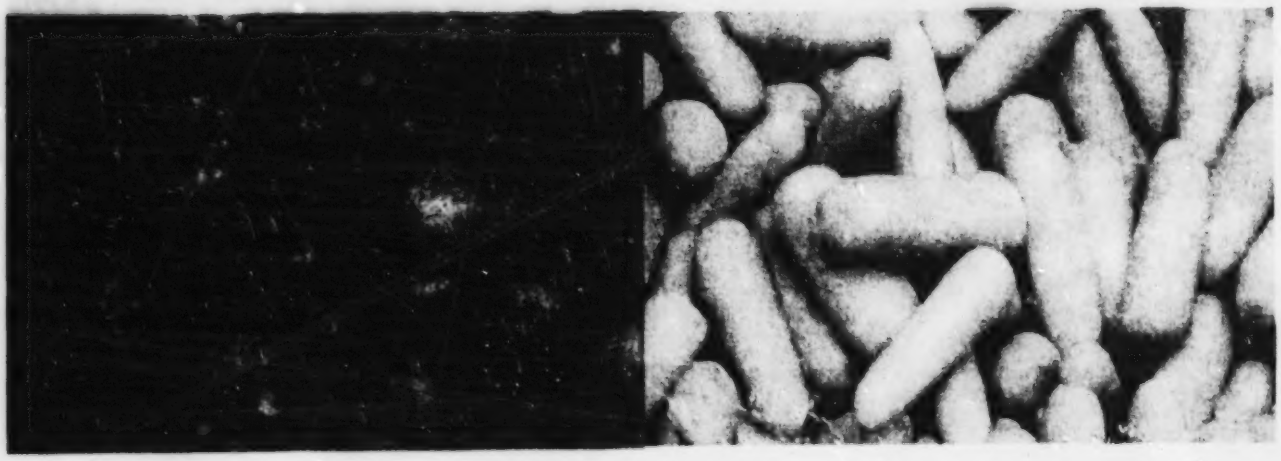
Manitoba Agriculture and Food

Program & Policy Analysis

2001

Manitoba Potatoes & Other Vegetables Industry Profiles



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N/A = not available

Data sources: Agriculture and Agri-Food Canada
Manitoba Agriculture and Food
Peak of the Market
Statistics Canada
Manitoba vegetable producers

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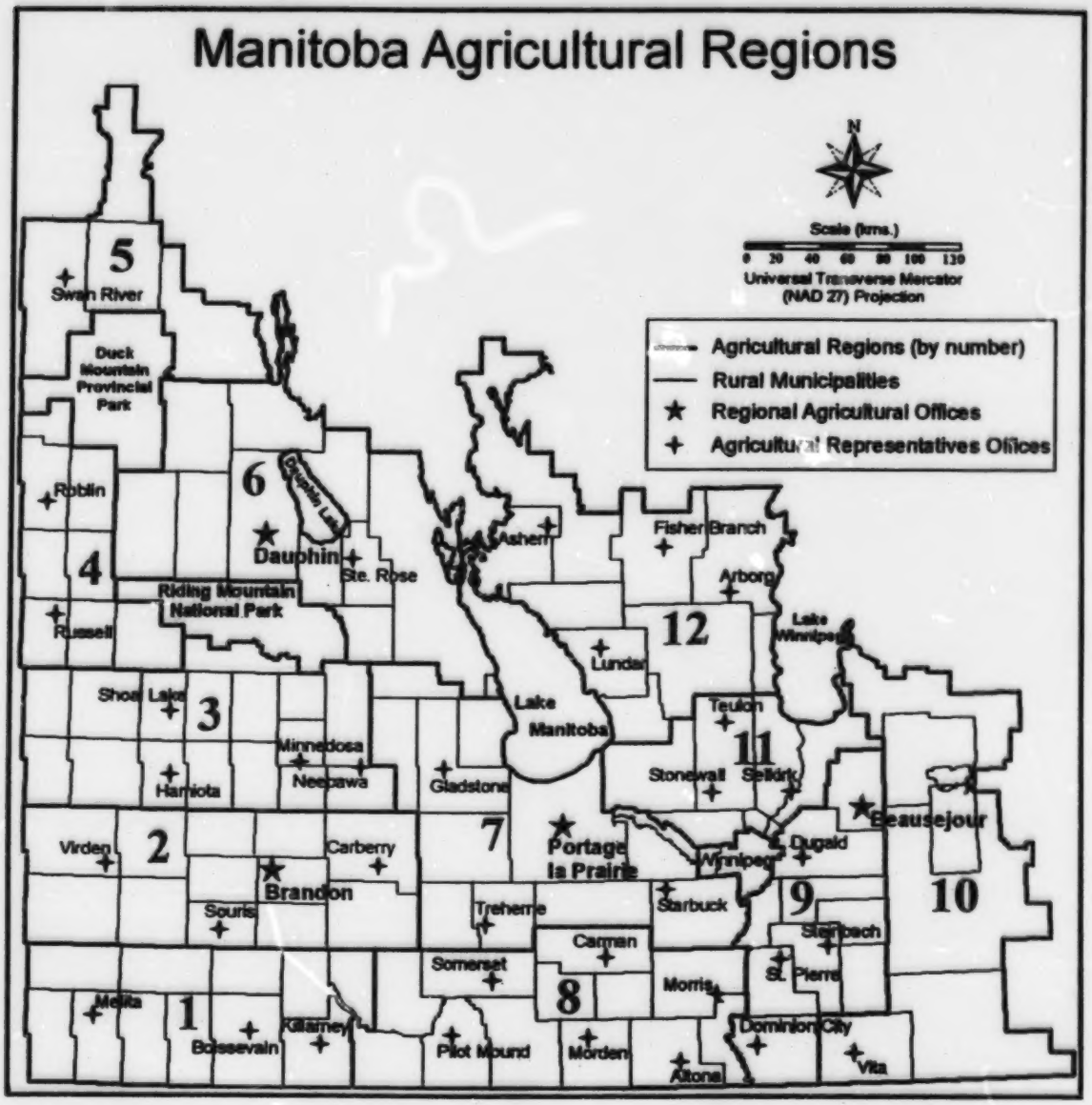
August, 2002

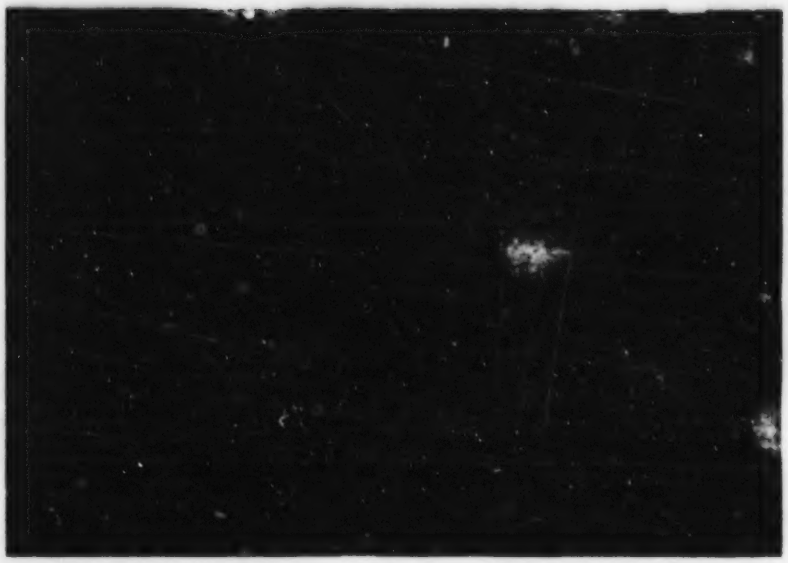
Manitoba Agricultural Regions



Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

102-07334/

POTATO SECTOR



POTATO SECTOR PROFILE

Production:

Manitoba's commercial potato industry involves the production of potatoes for the fresh, processing and seed markets and is the second largest in Canada. Potatoes can be grown over a wide range of soils and climatic conditions, but most commercial production is concentrated south and west of Winnipeg in the Portage la Prairie, Winkler-Morden, Treherne, Holland and Carberry areas. Production also takes place in the Selkirk, Melita and Steinbach areas. More than 120 producers of processing potatoes, 37 growers of table stock and 28 seed potato producers employed over 1,500 full-time and casual workers in 2001. Over 27 varieties of potatoes are grown in the province. The table varieties are mainly Reds with some Russets and yellow-fleshed varieties, while the main varieties used for processing are Russet Burbank and Shepody.

Commercial potato production was first recorded in the province in 1908, when 20,800 acres produced 2.3 million cwt. The area planted to potatoes rose to 45,000 acres in 1918, remained mainly in the 30,000-40,000 acre range until the late 1940s, when the seeded area dropped to below 20,000 acres for more than a decade. The over-abundance of grain in the late 1950s and early 1960s encouraged Manitoba producers to look for alternative cash crops and potatoes had potential. Production in the province shifted from Steinbach and north of Winnipeg in the Lockport and Selkirk areas to Portage la Prairie, Carman and Winkler, and then to Holland, Treherne and Carberry. More recently, potato production has expanded to the Melita and Pipestone areas.

Over the years, the table and seed potato area has increased as new markets were developed in the prairies and Ontario initially and then more recently in Quebec, Illinois, Pennsylvania, Minnesota, North Dakota, Florida, Texas, California and Oregon. With the expansion of the potato processing industry and increased use of irrigation, the area seeded to potatoes continued to grow. In 2001, the total area planted to potatoes reached a record 78,500 acres. As about 3,000 acres, mostly for processing, were lost due to excessive moisture, only 75,500 acres were harvested. With 19 percent of Canada's potato area, Manitoba is the second largest producer after Prince Edward Island. While 71 percent of the existing area of processing potatoes is under irrigation, almost all new potato land will be irrigated.

Potato prices averaged below $6/cwt up until 1983, but have ranged between $6.06/cwt and $8.67/cwt in all but two years since then. Mainly due to the drought in Eastern Canada and reduced potato supply in the United States, the average price in 2001 was a new record, $8.67/cwt, up from the previous record of $8.49/cwt in 2000. In 2001, the potato crop was valued at a $129.1 million, four percent of the total value of agricultural production in the province and two thirds of the value of Manitoba's horticultural production.

Marketing:

Of the 14.9 million cwt. of potatoes marketed in 2001, 86 percent was contracted for processing, over 7 percent was for table stock and 6 percent was sold as certified seed. Wholesalers and processors are attracted to Manitoba's year-round supply of high-grade, consistent quality, good-tasting potatoes.

Since 1942, various forms of marketing co-operatives have been involved with selling Manitoba table potatoes. After the establishment of the Manitoba Vegetable Marketing Commission in 1966 and the Manitoba Vegetable Producers' Marketing Board in 1972 (now called Peak of the Market), a modern facility was built, providing warehousing and packaging facilities for potatoes. Peak of the Market employs 43 full-time staff plus some temporary staff. Washed, graded table potatoes are delivered to Peak in bulk trailers or in 50 and 75 lb bags by producers. Bulk product is pre-packed into 5, 10 and 20 lb bags by Peak of the Market. Peak's sales of table potatoes from the 2001 crop increased to $20.5 million.

In 2001-02, there were 12.8 million cwt. of Manitoba processing potatoes marketed with a value of $97.3 million. Keystone Vegetable Producers' Association assists growers with price negotiations with the processing companies, such as Midwest Food Products and McCain Foods. Marketing of processed potato products is done by the companies.

About half of the seed potatoes passing inspection were sold to processors. The value of seed potatoes, certified and used or sold for seed, fell to $11.2 million in 2001-02.

Processing:

The four major potato processors in Manitoba are Midwest Food Products (was Nestle-Simplot) (1962) in Carberry, McCain Foods (1977) in Portage la Prairie and Old Dutch Foods (1956) and Naleway Foods (1940s) in Winnipeg. Potatoes are grown under contract for the processors with the most common variety being Russet Burbank. Two pounds of potatoes are needed to produce one pound of french fries, while almost four pounds of potatoes are used for one pound of potato chips.

Midwest employs over 500 people to process about 650 million lb of potatoes, mainly into frozen french fries, 80 percent of which are sold to fast food chains. Their 140 ft third line blancher is one of the longest in the world. Only about 3-4 percent of Midwest's production goes to the retail market. McCain's processes over 600 million lb of potatoes, mainly for the retail market. The province has about 40-50 percent of national french fry production capacity. Manitoba french fries are consumed in the USA, Japan and Hong Kong. Other potato products sold by the two plants include potato flakes, hash brown patties, granules, dollar fries, wedge fries and tater gems. Old Dutch's 170 employees were involved in processing 40 million lb of potatoes into Saratoga chips for sale in Canada and Japan. Naleway uses about 10 million lb of potatoes for their ethnic food and catering business. Naleway products are marketed in Ontario, Saskatchewan and the USA.

J.R Simplot is constructing a $120 million potato processing plant near Portage la Prairie to be completed by spring 2003. The plant will employ about 230 people initially to produce up to 300 million lb of french fries and other frozen potato products, but the plant could eventually be expanded to handle double that capacity. Initial annual requirements for raw potatoes will be 550 million lb or about 20,000 acres of potatoes.

Trade:

Manitoba's exports of fresh potatoes, seed potatoes and potato products increased by 12.4 percent to $150.6 million in 2001, $142.8 million of which was processed product. While most of Manitoba's fresh and processed potato exports went to the United States, small amounts of frozen french fries were shipped to Malaysia, Philippines, Jordan and Japan. Other processed potato products were sent to Hong Kong and Germany in 2001.

Manitoba imported $2.5 million of fresh potatoes, $1.1 million of seed potatoes and $5.8 million of processed potato products in 2001, most of which came from the United States. Potato starch was also imported from the United Kingdom and the Netherlands.

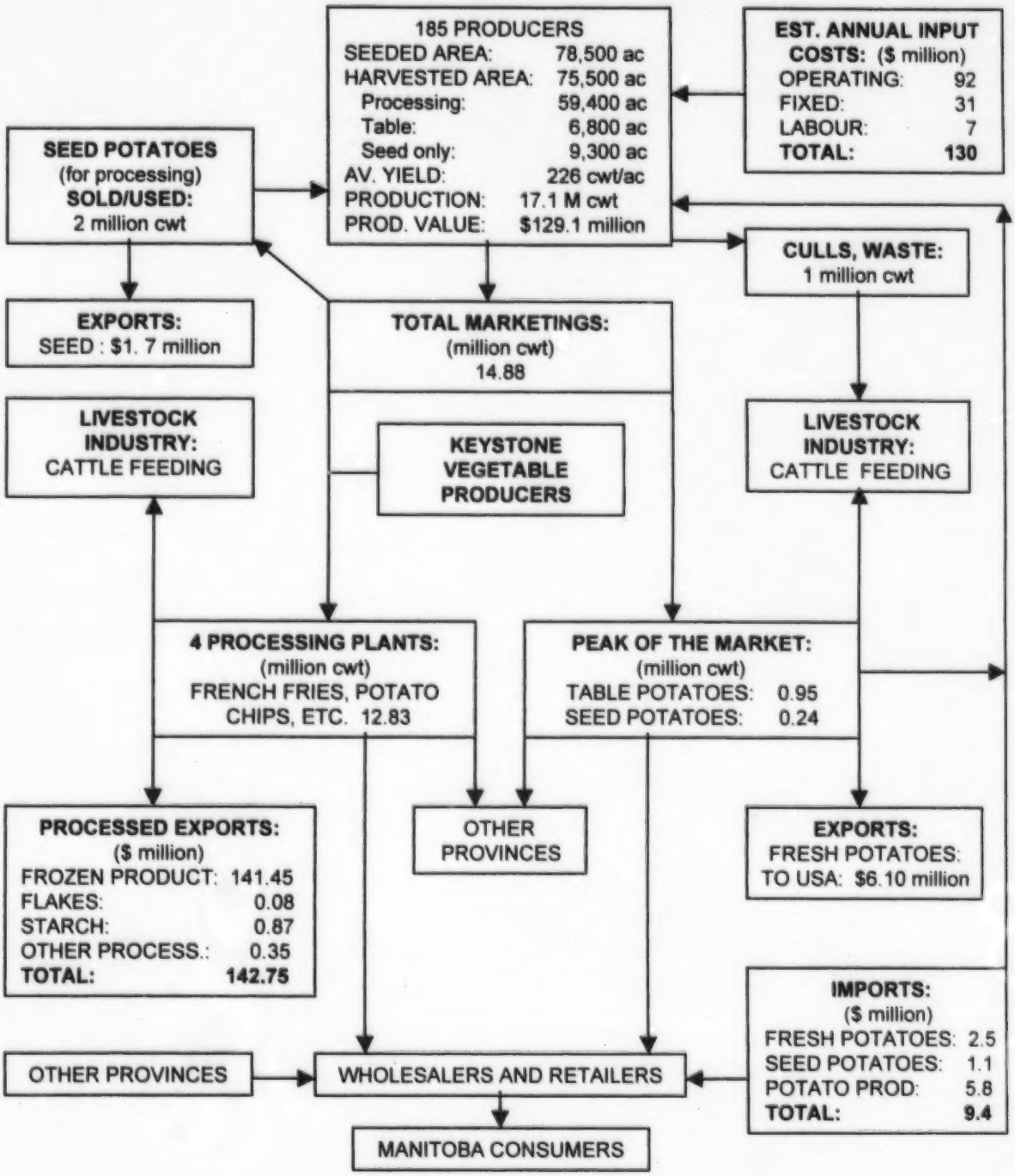
Potential:

With large areas of land suitable for irrigated potato production and the potential for an expanding processing industry, Manitoba could become the largest potato producer in Canada. The limiting factors will be water availability for irrigation, high capital and operating costs to start potato production and the relatively high prices of other irrigated crops. Manitoba producers use the most modern production and storage equipment and techniques available. The co-operation between growers, processors, Peak of the Market, wholesalers, government and research agencies has contributed to the success of the potato industry in the province.

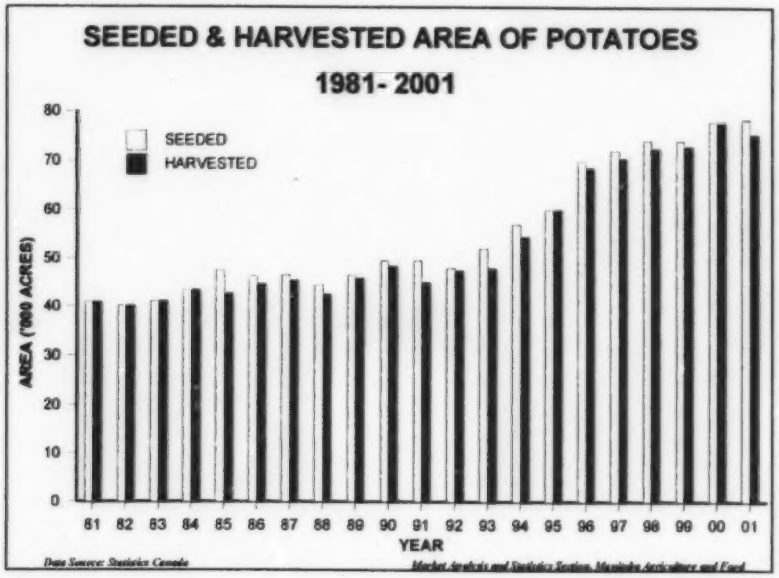
POTATO AND POTATO PRODUCTS SE R

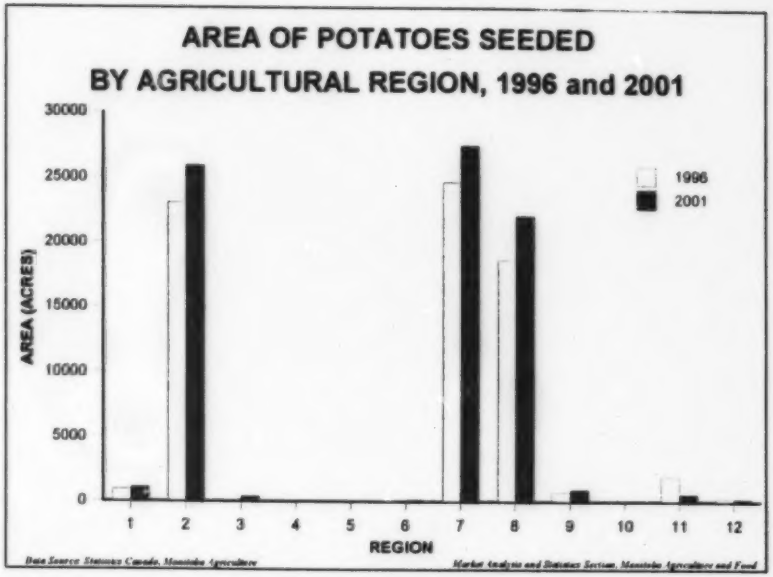
	1998	1999[R]	2000[R]	001[P]	'01 as a % of '00
Number of Commercial Operations	150	170	180	185	103
CROP PRODUCTION:					
Seeded Area ('000 acres)	74.0	74.0	78.0	78.5	101
% of Canada	18.8	18.7	19.1	19.7	
Irrigated Area ('000 acres)	NA	51.2	55.0	55.6	101
Harvested Area ('000 acres)	72.5	73.0	77.8	75.5	97
Yield/harvested acre (cwt)	235	225	238	226	95
Total Production (million cwt)	17.0	16.4	18.5	17.1	92
% of Canada	18.0	17.4	18.4	19.3	
Average Price ($/marketed cwt)	8.38	8.43	8.49	8.67	102
VALUE OF PRODUCTION ($ million):	130.0	125.0	140.0	129.1	92
TOTAL EXPENSES: ($/irrigated acre)	NA	1,627	1,670	1,712	103
CASH RECEIPTS ($ million):	105.5	118.6	111.3	128.0	115
% of Canada	17.2	16.9	16.4	17.5	
CROP DISPOSITION (million cwt):	17.0	16.4	18.5	7.1	92
Marketings	15.5	14.8	16.5	4.9	90
Processing potatoes	13.3	12.4	13.8	12.8	93
Table potatoes	0.9	1.5	0.9	0.9	100
Seed potatoes	1.3	0.9	1.7	1.1	65
Seed (growers' own use)	0.9	0.9	1.0	1.2	120
Culls, Waste	0.6	0.7	1.0	1.0	100
EXPORTS ($ million):	145.7	149.6	134.0	150.6	112
Fresh Potatoes	3.7	4.1	3.4	6.1	179
Processed Potato Products	141.6	144.1	128.7	142.8	111
Seed Potatoes	0.4	1.4	1.9	1.7	89
IMPORTS ($ million):	8.3	7.1	10.2	9.4	92
Fresh Potatoes	2.3	1.9	4.5	2.5	56
Processed Potato Products	5.0	4.6	4.2	5.8	138
Seed Potatoes	0.9	0.6	1.4	1.1	79

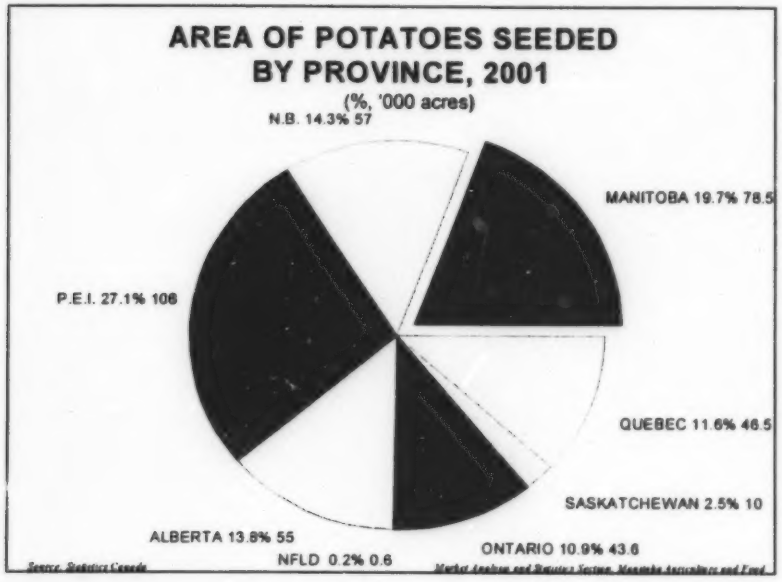
POTATO INDUSTRY CHART, 2001

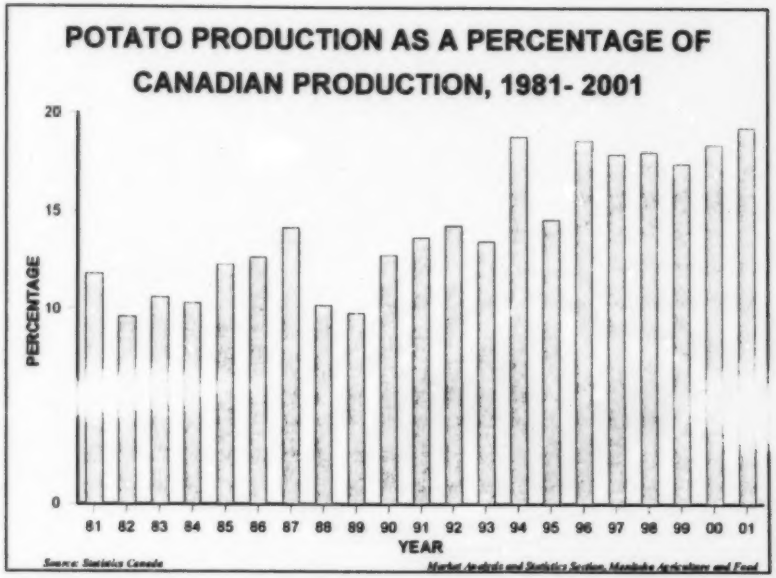


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Peak of the Market, Canadian Food Inspection Agency

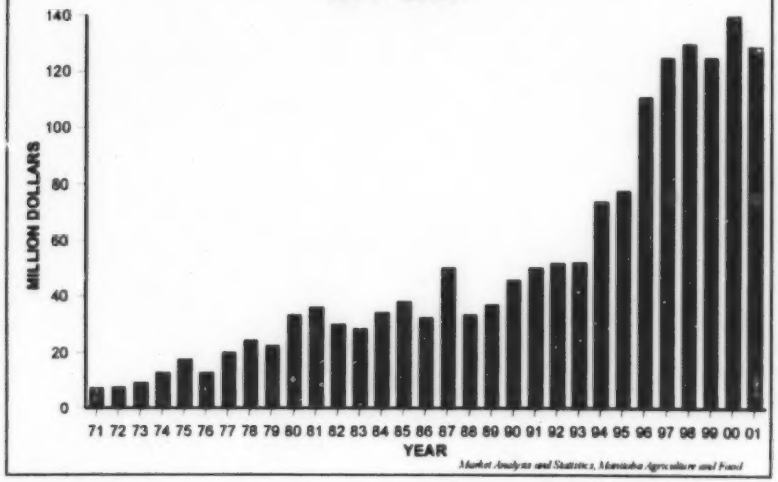

SEEDED & HARVESTED AREA OF POTATOES
1981- 2001
SEEDED
HARVESTED
AREA ('000 ACRES)
YEAR
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF POTATOES SEEDED
BY AGRICULTURAL REGION, 1996 and 2001
1996
2001
AREA (ACRES)
REGION
1 2 3 4 5 6 7 8 9 10 11 12
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF POTATOES SEEDED
BY PROVINCE, 2001
(%, '000 acres)
N.B. 14.3% 57
MANITOBA 19.7% 78.5
P.E.I. 27.1% 108
QUEBEC 11.6% 46.5
SASKATCHEWAN 2.5% 10
ALBERTA 13.8% 55
ONTARIO 10.9% 43.6
NFLD 0.2% 0.6
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

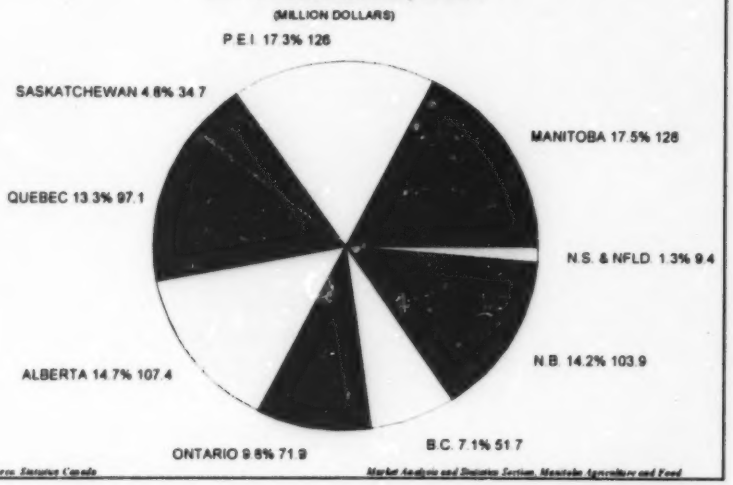

POTATO PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2001
PERCENTAGE
YEAR
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FARM VALUE OF POTATO PRODUCTION
1971- 2001



Market Analysis and Statistics, Manitoba Agriculture and Food

FARM CASH RECEIPTS FROM POTATOES BY PROVINCE, 2001



Source: Statistics Canada

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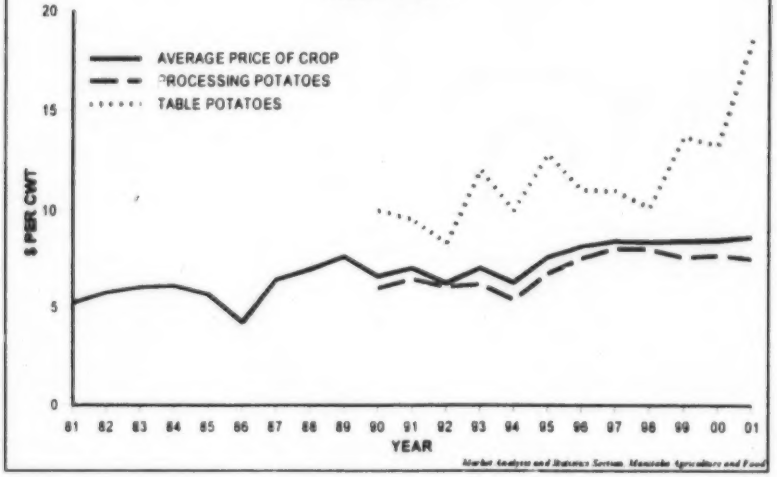
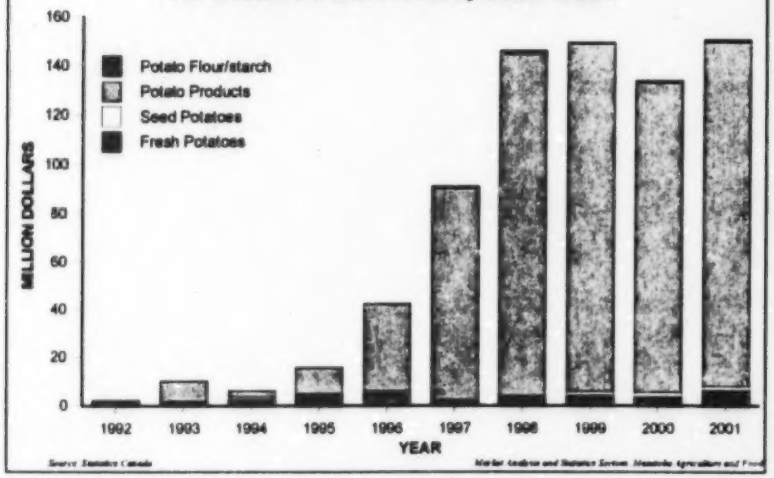
POTATO PRICES
1981- 2001



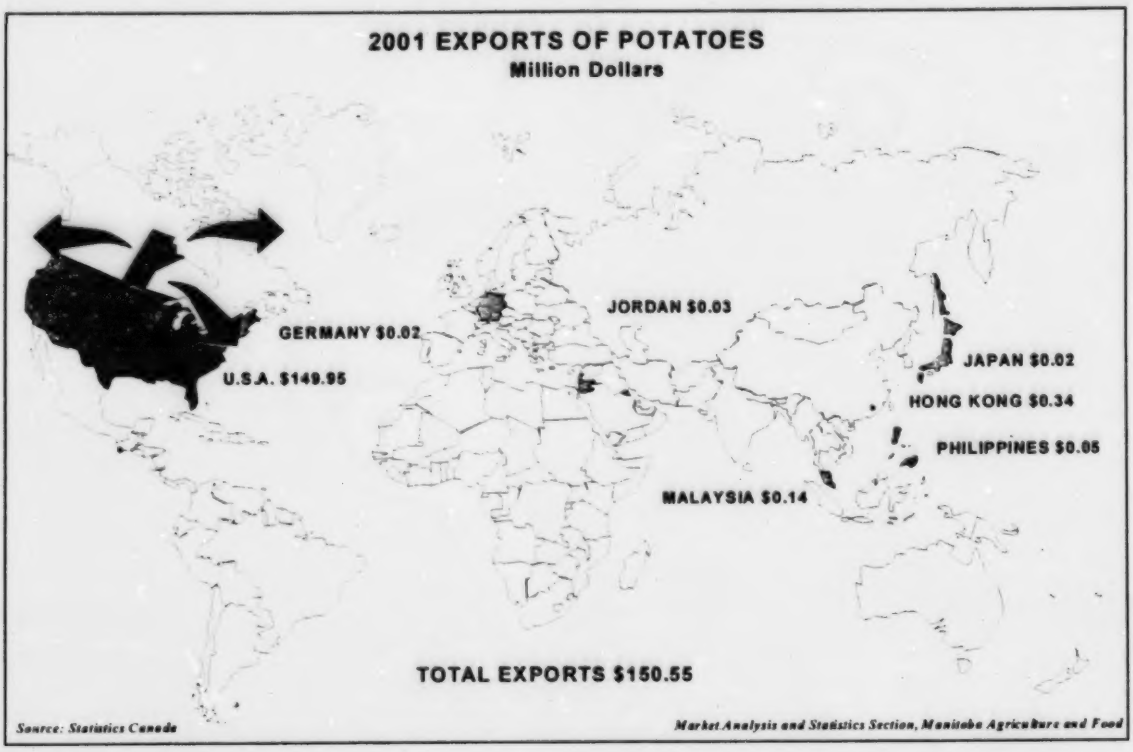
Market Analysis and Statistics Section, Manitoba Agriculture and Food

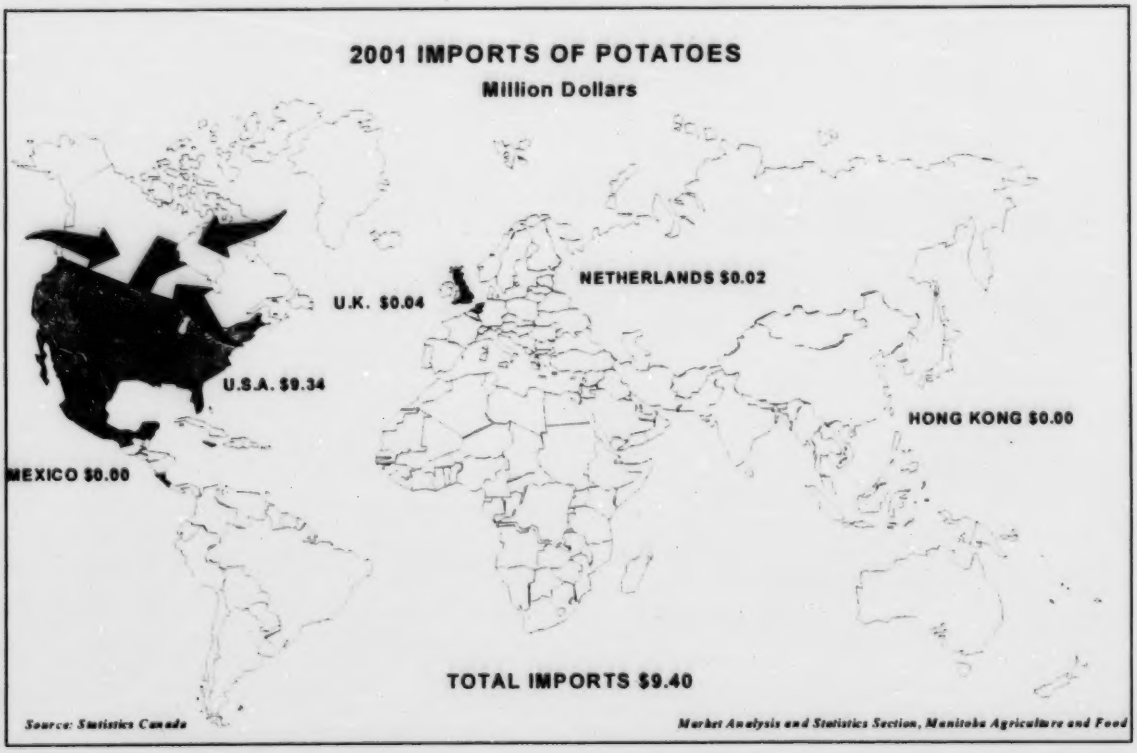
MANITOBA POTATO AND PRODUCT EXPORTS TO OTHER COUNTRIES, 1992- 2001



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food


2001 EXPORTS OF POTATOES
Million Dollars
GERMANY $0.02
U.S.A. $149.95
JORDAN $0.03
JAPAN $0.02
HONG KONG $0.34
PHILIPPINES $0.05
MALAYSIA $0.14
TOTAL EXPORTS $150.55
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2001 IMPORTS OF POTATOES
Million Dollars
U.K. $0.04
NETHERLANDS $0.02
U.S.A. $9.34
MEXICO $0.00
HONG KONG $0.00
TOTAL IMPORTS $9.40
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

OTHER VEGETABLE SECTOR

VEGETABLE SECTOR PROFILE

Production:

Manitoba's commercial vegetable industry involves the production of vegetables for the fresh market with small amounts being processed. Although of increasing importance to the Manitoba economy, the industry is still relatively small compared to the major producing provinces of Ontario, Quebec and British Columbia. There are about 25 major commercial vegetable producers and about 235 market gardeners in Manitoba who employed close to 2,000 full-time and seasonal farm workers. Most commercial production is concentrated west, south and north of Winnipeg in the Portage la Prairie, Marquette, Winkler, East St. Paul and Emerson areas. Almost all the vegetable land is irrigated so generally is located close to rivers or aquifers. Over 110 different types of vegetables are grown ranging from asparagus to zucchini, the most important being carrots, onions, cauliflower, cabbage, sweet corn and broccoli.

Early settlers in the province had home vegetable gardens and in many cases, excess produce was sold. Commercial vegetable production was first recorded in Manitoba in 1936, when about $1.5 million of produce was sold. The area planted to vegetables destined for the fresh market was 2,200 acres in 1947, while 250 acres of vegetables were used for processing. The non-commercial vegetable area was estimated at 1,116 acres. The vegetable area increased in the mid-1950s to over 3,000 acres for the fresh market and over 1,000 acres for processing. Interest in vegetable production declined in the mid-1960s, but rose again in the late 1970s, from which time between 4,000 and 6,000 acres have been planted to vegetables each year.

In 2001, 4,652 acres of vegetables were seeded for commercial production, of which 4,519 acres were harvested. Interest in Oriental vegetable production continued in 2001. Market opportunities allowed for a total area of about 30 acres of various oriental crops, including *bok choy, Chinese cabbage, Chinese broccoli (gai lahn), yu choy, hot peppers, eggplants, Shanghai bok choy, fu gua (bitter melon), Chinese watermelon/ muskmelon, long beans, baby bok choy, watercress and daikon/lo bok (Japanese radish/Chinese radish*).

Wet and cool conditions in the spring of 2001 resulted in planting delays and slow crop growth. The hot, dry summer months along with irrigation allowed crops to catch up with little or no loss of markets. The extended fall harvest conditions were excellent with no delays and good quality of root crops going into storage. The long, dry fall conditions resulted in virtually no summer crops being left in the field and allowed fall field work to be completed without difficulty. Generally, yields were average to good with quality rated as fair to good.

Marketing:

Summer crop market demand was generally good with a slow down in all crop markets for a short period after the September 11, 2001 terrorist attacks in the United States. Good fall weather conditions nationwide allowed Manitoba's major competitors in Alberta and Ontario to continue harvest into the first and third weeks of December, respectively. This created pricing and demand problems for Manitoba growers throughout this period and into the New Year. In particular, storage onion prices were severely depressed throughout the storage season. Overall the crop year could be rated as fair to average.

Vegetable producers marketed about 81.3 million lb of produce from the 2001 crop

valued at $20.36 million, compared to 64.0 million lb and $16.6 million for the 2000 crop. Manitoba-grown vegetables were sold throughout Manitoba, Saskatchewan and into Alberta, Ontario and the United States.

Since 1942, various forms of marketing co-operatives have been involved with selling Manitoba fresh vegetables. After the establishment of the Manitoba Vegetable Marketing Commission in 1966 and the Manitoba Vegetable Producers' Marketing Board in 1972 (now called Peak of the Market), a modern facility was built, providing warehouse facilities for vegetables. Almost all vegetable farms now have their own washing, grading and packaging facilities. Vegetables are washed, graded and packed into bulk containers or consumer-sized bags by producers before being delivered to Peak of the Market. Peak employs 43 full-time staff plus some temporary staff. Peak markets the vegetables under the "Peak of the Market" label to wholesalers and retailers in Manitoba and other provinces as well as to the United States and a few other countries. Wholesalers and processors are attracted to Manitoba's high-grade, consistent quality, flavourful vegetables, some of which are available almost year-round, such as onions, carrots, beets and parsnips. Manitoba growers have one of the most technologically advanced storage programs in North America.

About one quarter of Manitoba's commercially-produced vegetables are marketed by producers directly to wholesalers and retailers in Manitoba, Saskatchewan, Alberta and the United States or to consumers through farmers' markets and roadside stands.

There are ten vegetable wholesalers in Manitoba which distribute imported and locally-produced vegetables.

Processing:

Commercial vegetable processing in Manitoba, which began with canning peas in 1924 and pickling a few tons of produce in 1933, expanded in 1945 in Winkler and in 1946 in Winnipeg to include additional canned vegetables, such as peas, beans and spinach. Further expansion took place in 1952, with a new canning plant in Morden which processed peas, beans, corn and tomatoes, and again in 1956 in Winnipeg, when root crops were used in the processing of diced vegetables and in vegetable stew products. Campbell Food's soup plant opened in Portage la Prairie in 1960 and for 30 years was the major vegetable processor in the province. Since Campbell's closed in 1990, no canning or freezing of vegetables has been done on a large commercial scale in Manitoba.

Crocus Foods Ltd. of Portage la Prairie was the only processor of fresh vegetable products in Manitoba in 2001, but closed in 2002.

Trade:

Manitoba exported close to $3.7 million of fresh and prepared vegetables in 2001, mainly fresh carrots, onions, cabbage, cauliflower and broccoli. Almost all of these fresh vegetable exports were to the United States with small amounts going to Mexico and several other countries. Very small amounts of processed product were shipped to the United States and four other countries.

Because of the climate, Manitoba has to import from other provinces and countries a large portion of the non-storable fresh vegetables consumed in the province. Imports of fresh and frozen vegetables from the United States, Mexico and 14 other countries amounted to $39.7 million and $0.4 million in 2001 respectively, while processed vegetable imports from the United States and 12 other countries totalled $12.8 million.

HARVESTED AREA OF VEGETABLES

	1998	1999	2000	2001	2001 as a % of 2000
NUMBER OF FARMS:					
Major Commercial Farms	18	20	25	25	100
Market Gardeners	290	280	230	235	102
SEEDED AREA (acres):	**4,478**	**4,630**	**4,478**	**4,652**	**104**
HARVESTED AREA (acres):	**4,405**	**4,600**	**4,418**	**4,519**	**102**
Asparagus	110	110	115	120	104
Beans, green/wax	95	100	90	80	89
Beets	40	45	45	60	133
Broccoli	350	375	350	370	106
Cabbage	430	400	460	425	92
Carrots	660	755	740	720	97
Cauliflower	450	500	480	490	102
Celery (est.)	100	120	120	125	104
Corn, sweet	830	700	670	800	119
Cucumber	130	125	135	150	111
Lettuce	200	255	175	134	76
Onions, all dry	400	420	433	520	120
Onions, green	40	40	40	40	100
Parsnips	55	45	55	50	91
Peas, green	120	70	70	80	114
Peppers	40	30	45	60	133
Radish	40	45	45	48	107
Rutabagas	70	25	30	27	90
Squash/Pumpkins	110	135	105	110	105
Tomatoes	25	20	25	30	120
Other Vegetables (excl Onion sets)	110	85	75	80	107

MARKETED VEGETABLE YIELDS

	1998	1999	2000	2001	2001 as a % of 2000
YIELD ('000 lb/acre):					
Asparagus	3.6	2.9	3.1	2.9	94
Beans, green/wax	1.8	2.6	2.2	2.3	105
Beets	17.5	12.0	10.4	10.0	96
Broccoli	9.9	6.9	14.3	11.1	78
Cabbage	23.3	24.8	12.0	25.9	216
Carrots	27.6	25.2	24.3	26.4	109
Cauliflower	12.0	10.8	7.5	10.2	136
Celery (est.)	24.0	12.5	13.3	29.6	223
Corn, sweet	7.2	4.4	6.7	8.8	131
Cucumber	12.3	12.7	14.3	14.7	103
Lettuce	7.5	7.8	13.0	11.9	92
Onions, all dry	28.2	35.6	32.5	34.9	107
Onions, green	35.0	38.3	48.8	37.5	77
Parsnips	13.2	13.8	14.6	15.6	107
Peas, green	1.1	0.7	1.0	3.0	300
Peppers	4.3	11.7	5.6	10.0	179
Radish	8.1	8.2	3.0	7.9	264
Rutabagas	16.4	19.6	13.3	25.9	195
Squash/Pumpkins	14.2	12.1	16.2	34.1	210
Tomatoes	6.2	7.0	4.0	16.7	418

SELECTED VEGETABLE MARKETINGS

	1998	1999	2000	2001	2001 as a % of 2000
MARKETINGS ('000 lb):	**66,450**	**67,340**	**63,970**	**81,320**	**127**
Asparagus	400	320	355	350	99
Beans, green/wax	175	260	200	180	90
Beets	700	540	470	600	128
Broccoli	3,450	2,600	5,000	4,100	82
Cabbage	10,000	9,900	5,500	11,000	200
Carrots	18,200	19,000	18,000	19,000	106
Cauliflower	5,400	5,400	3,600	5,000	139
Celery	2,400	1,500	1,600	3,700	231
Corn, sweet	6,000	3,100	4,500	7,000	156
Cucumber	1,600	1,590	1,925	2,200	114
Lettuce	1,500	2,000	2,270	1,600	70
Onions, all dry	11,113	14,110	14,065	18,140	129
Onions, green	1,400	1,530	1,950	1,500	77
Parsnips	725	620	800	780	98
Peas, green	135	50	70	240	343
Peppers	170	350	250	600	240
Radish	325	370	135	380	281
Rutabagas	1,150	490	400	700	175
Squash/Pumpkins	1,565	1,630	1,700	3,750	221
Tomatoes	155	140	100	500	500

AVERAGE VEGETABLE PRICES

	1998	1999	2000	2001	2001 as a % of 2000
AVERAGE PRICE ($/lb):					
Asparagus	1.28	1.40	1.58	1.50	95
Beans, green/wax	0.66	0.63	0.68	0.61	90
Beets	0.21	0.31	0.34	0.34	100
Broccoli	0.39	0.39	0.35	0.30	86
Cabbage	0.137	0.13	0.16	0.18	113
Carrots	0.21	0.177	0.21	0.21	100
Cauliflower	0.37	0.34	0.46	0.36	78
Celery	0.25	0.25	0.26	0.20	77
Corn, sweet	0.21	0.25	0.25	0.25	100
Cucumber	0.20	0.20	0.26	0.23	88
Lettuce	0.27	0.26	0.26	0.40	154
Onions, cooking/Spanish	0.162	0.11	0.14	0.17	121
Onions, green	0.345	0.35	0.39	0.35	90
Parsnips	0.765	0.74	0.88	0.75	85
Peas, green	1.00	1.15	1.20	1.50	125
Peppers	0.45	0.40	0.42	0.40	95
Radish	0.46	0.48	0.50	0.60	120
Rutabagas	0.17	0.18	0.27	0.26	96
Squash/Pumpkins	0.17	0.20	0.19	0.24	126
Tomatoes	0.42	0.42	0.75	0.75	100

VALUE OF VEGETABLE PRODUCTION

	1998	1999	2000	2001	2001 as a % of 2000
VALUE OF PROD. ($'000)	**15,970**	**14,970**	**16,600**	**20,360**	**123**
Asparagus	510	450	560	525	94
Beans, green/wax	115	165	135	110	81
Beets	147	165	160	205	128
Broccoli	1,350	1,000	1,750	1,230	70
Cabbage	1,370	1,290	880	1,980	225
Carrots	3,850	3,300	3,800	3,990	105
Cauliflower	2,000	1,850	1,650	1,800	109
Celery	600	375	420	740	176
Corn, sweet	1,260	770	1,125	1,750	156
Cucumber	320	320	500	505	101
Lettuce	400	520	590	640	108
Onions, all dry	1,867	1,640	2,062	3,175	154
Onions, green	483	535	760	525	69
Parsnips	555	460	700	585	84
Peas, green	135	60	84	360	429
Peppers	77	140	105	240	229
Radish	150	177	67	230	343
Rutabagas	200	90	110	180	164
Squash/Pumpkins	270	260	312	915	293
Tomatoes	65	60	75	375	500
Other Vegetables (excl Onion sets)	333	150	125	300	240

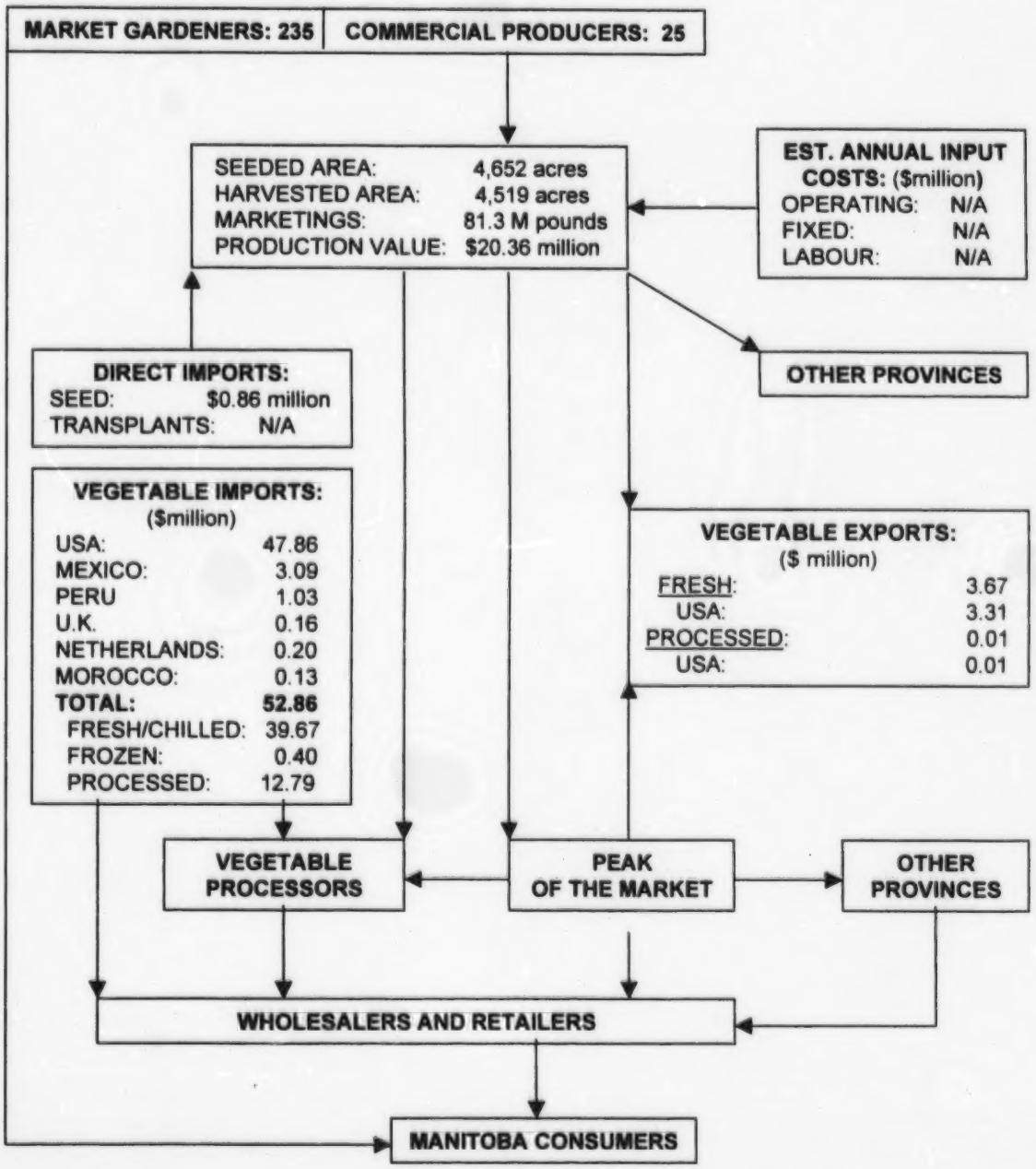
FRESH AND FROZEN VEGETABLE EXPORTS

	1998	1999[R]	2000[R]	2001	2001 as a % of 2000
EXPORTS ($ thousand):	**2,438.8**	**2,927.8**	**2,255.4**	**3,682.3**	**163**
Asparagus	13.6	13.0	0	0	
Beans, green/wax	4.5	131.8	0	172.7	
Beets/Radishes/Parsnips	8.0	45.9	14.6	110.1	754
Cabbage	271.7	510.9	305.9	149.4	49
Carrots/Rutabagas	652.0	316.8	249.9	238.5	95
Cauliflower/Broccoli	541.4	404.3	246.9	143.1	58
Celery	0	0	0	0	
Corn, sweet	0	0	49.9	0	0
Cucumber	36.2	25.5	7.6	116.6	1534
Onions	674.7	1,327.5	1,656.6	2,651.9	160
Peas, green	8.3	15.7	0	18.8	
Other Veg. (incl. mushrooms)	228.4	136.4	220.8	81.2	37

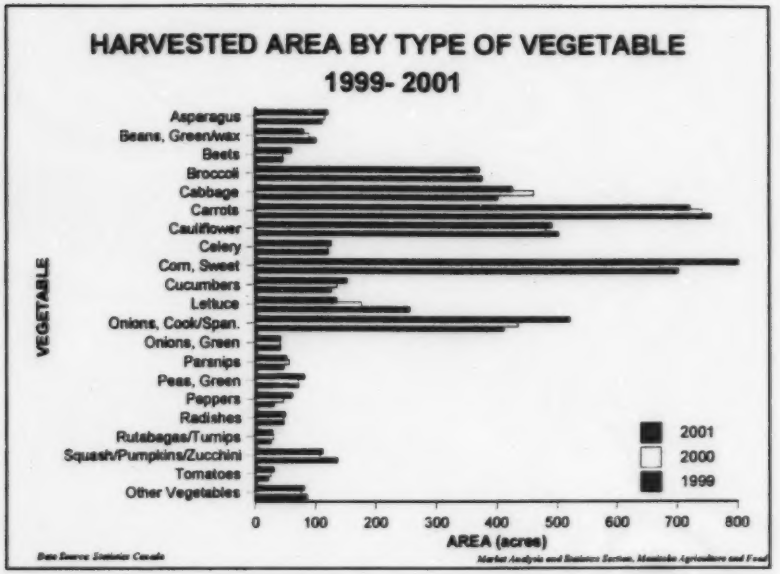
FRESH, FROZEN AND PROCESSED VEGETABLE IMPORTS

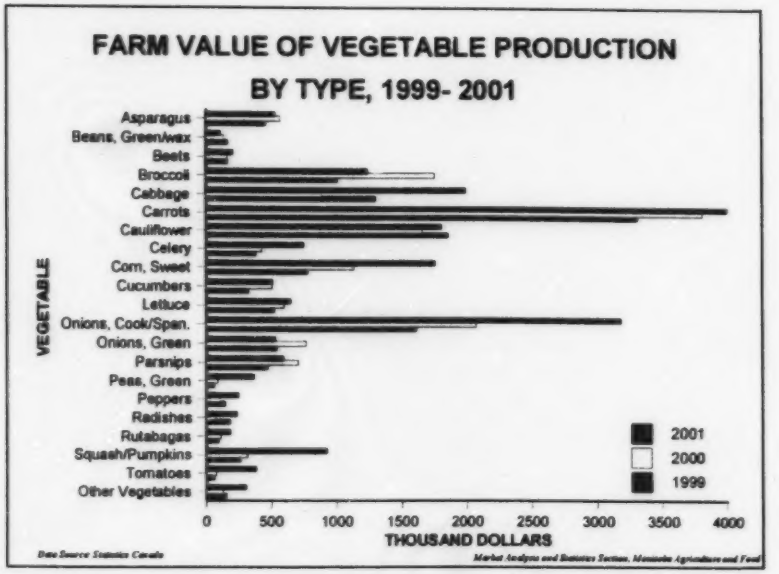
	1998	1999[R]	2000[R]	2001	2001 as a % of 2000
IMPORTS ($ million):	**43.2**	**42.6**	**44.9**	**52.9**	**118**
Asparagus	0.6	0.9	1.2	1.8	150
Beans, green/wax	1.9	1.5	1.0	0.8	80
Beets/Radishes/Parsnips	0.5	0.6	0.7	0.6	86
Cabbage	2.5	0.9	1.0	1.2	120
Carrots/Rutabagas	1.9	2.6	2.1	2.4	114
Cauliflower/Broccoli	1.4	2.6	3.1	3.0	97
Celery	1.2	1.1	1.5	1.3	87
Corn, sweet	1.2	2.7	1.9	1.6	84
Cucumber	2.0	2.1	1.8	1.0	56
Lettuce	6.3	6.6	8.0	8.5	106
Onions	1.6	1.4	1.5	1.9	127
Peas, green	1.1	1.2	0.7	0.4	57
Peppers	1.9	2.3	3.0	3.3	110
Spinach	0.5	0.5	0.6	0.9	150
Tomatoes	11.8	9.9	11.1	15.0	135
Selected Other Vegetables	7.5	5.7	5.7	9.2	161

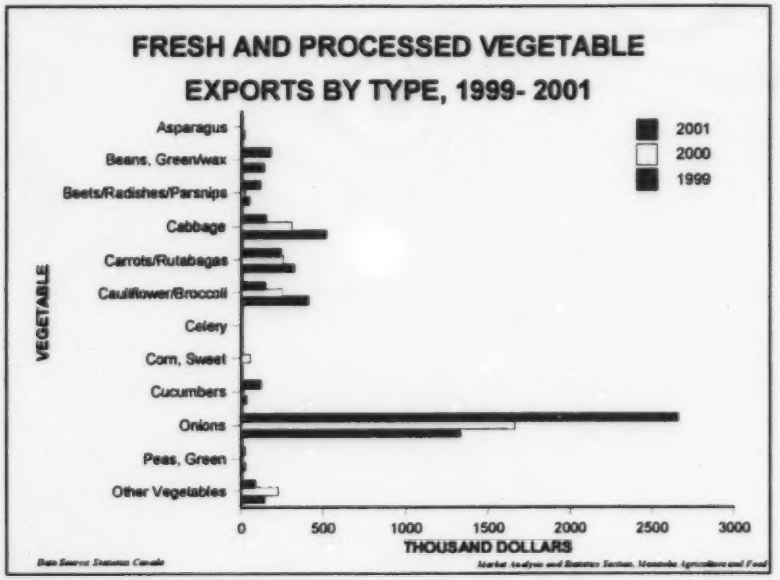
VEGETABLE INDUSTRY CHART, 2001



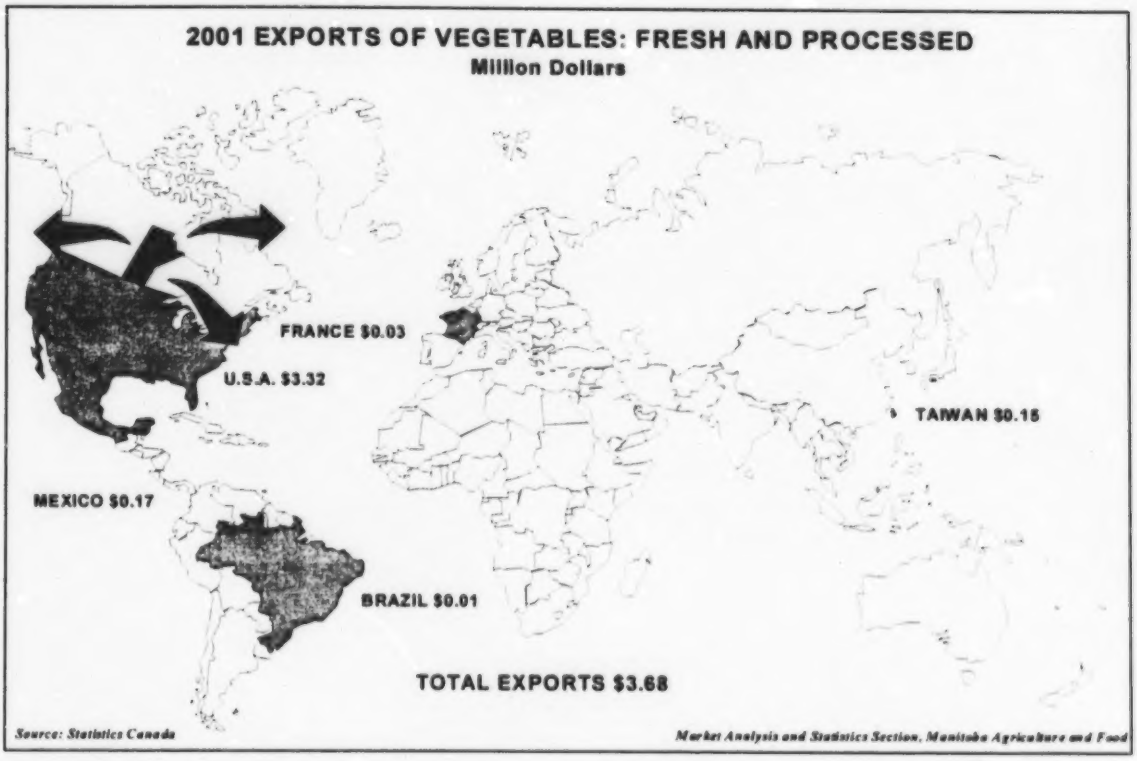
DATA SOURCE: Peak of the Market, Manitoba vegetable producers, Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

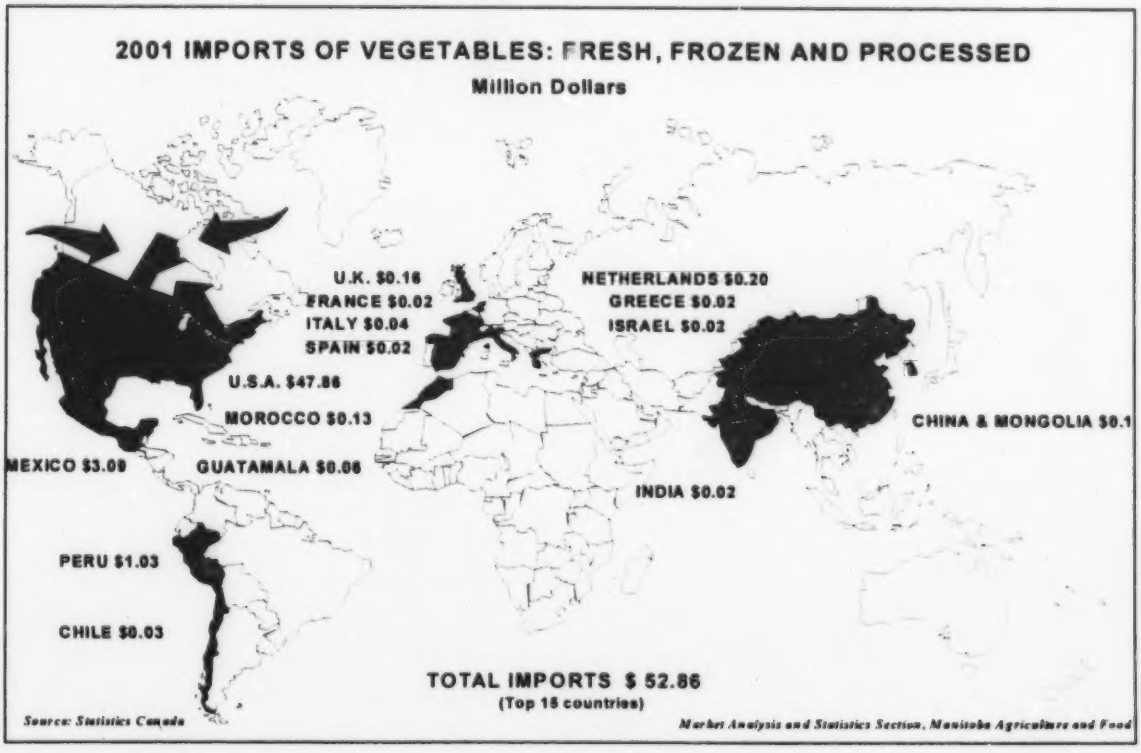

HARVESTED AREA BY TYPE OF VEGETABLE
1999- 2001
VEGETABLE
Asparagus
Beans, Green/wax
Beets
Broccoli
Cabbage
Carrots
Cauliflower
Celery
Corn, Sweet
Cucumbers
Lettuce
Onions, Cook/Span.
Onions, Green
Parsnips
Peas, Green
Peppers
Radishes
Rutabagas/Turnips
Squash/Pumpkins/Zucchini
Tomatoes
Other Vegetables
2001
2000
1999
0 100 200 300 400 500 600 700 800
AREA (acres)
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


FARM VALUE OF VEGETABLE PRODUCTION
BY TYPE, 1999- 2001
VEGETABLE
Asparagus
Beans, Green/wax
Beets
Broccoli
Cabbage
Carrots
Cauliflower
Celery
Corn, Sweet
Cucumbers
Lettuce
Onions, Cook/Span.
Onions, Green
Parsnips
Peas, Green
Peppers
Radishes
Rutabagas
Squash/Pumpkins
Tomatoes
Other Vegetables
2001
2000
1999
0 500 1000 1500 2000 2500 3000 3500 4000
THOUSAND DOLLARS
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


FRESH AND PROCESSED VEGETABLE
EXPORTS BY TYPE, 1999- 2001
VEGETABLE
Asparagus
Beans, Green/wax
Beets/Radishes/Parsnips
Cabbage
Carrots/Rutabagas
Cauliflower/Broccoli
Celery
Corn, Sweet
Cucumbers
Onions
Peas, Green
Other Vegetables
2001
2000
1999
0 500 1000 1500 2000 2500 3000
THOUSAND DOLLARS
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FRESH/FROZEN/PROCESSED VEGETABLE
IMPORTS BY TYPE, 1999- 2001
VEGETABLE
Asparagus
Beans, Green/wax
Beets/Radishes/Parsnips
Cabbage
Carrots/Rutabagas
Cauliflower/Broccoli
Celery
Corn, Sweet
Cucumbers
Lettuce
Onions
Peas, Green
Peppers
Spinach
Tomatoes
Other Vegetables
2001
2000
1999
0 2 4 6 8 10 12 14 16
MILLION DOLLARS
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2001 EXPORTS OF VEGETABLES: FRESH AND PROCESSED
Million Dollars
FRANCE $0.03
U.S.A. $3.32
TAIWAN $0.15
MEXICO $0.17
BRAZIL $0.01
TOTAL EXPORTS $3.68
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2001 IMPORTS OF VEGETABLES: FRESH, FROZEN AND PROCESSED
Million Dollars
U.K. $0.16
FRANCE $0.02
ITALY $0.04
SPAIN $0.02
NETHERLANDS $0.20
GREECE $0.02
ISRAEL $0.02
U.S.A. $47.86
MOROCCO $0.13
CHINA & MONGOLIA $0.1
MEXICO $3.09
GUATAMALA $0.06
INDIA $0.02
PERU $1.03
CHILE $0.03
TOTAL IMPORTS $ 52.86
(Top 15 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food